EDMS 2.0 USER'S MANUAL

Version 0.5

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Getting Started

ACCESSING THE EDMS FROM THE INTERNET

- **DEQ Employees:** Access the EDMS at the following URL: (http://edms.deq.louisiana.gov). Logon using your windows username (including the domain) and password.
- Other Users: Access the EDMS at the following URL: (http://edms.deq.louisiana.gov). There is no need to logon. The EDMS will automatically provide access to a guest account. Searches performed by the general public over the Internet are currently limited. If you are having trouble locating a document online, one or more of your search criteria may be in the restricted range. To perform a search without these limitations, please visit one of the Public Records Centers located at the DEQ headquarters building and regional offices. For more information about the Public Records Center (PRC), please go to:

http://www.deq.louisiana.gov/portal/tabid/2231/Default.aspx/

ACCESSING THE EDMS FROM THE LDEQ INTRANET

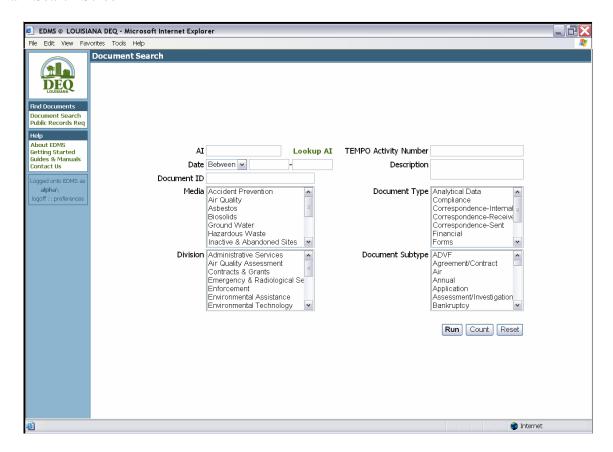
- **DEQ Employees:** Access the EDMS at the following URL: (http://edms.deq.louisiana.gov). Your windows account will be used to automatically log you on to the system. You may also logon manually using your windows username (including the domain) and password.
- Other Users: Access the EDMS at the following URL: (http://edms.deq.louisiana.gov), or click the logon shortcut available on the PRC computer desktop. You will automatically be logged on to the EDMS.

EDMS ACCOUNTS (LDEQ ONLY)

An EDMS account is an optional method of linking a user's Windows account with his or her FileNet credentials. Any DEQ employees can access EDMS, but without an EDMS account, they will be using guest one of a limited number of FileNet credentials.

Having an EDMS Account provides several benefits including automatic population of the From field in all email functions. Individual EDMS accounts also leave guest credentials free for users who have not yet been able to create an account. You may request an account by sending an email to an EDMS administrator. This can be done by using the selecting the **Account Request** option on the **Contact Us** from.

Main Search Screen



The column on the left side of the main search screen provides links to the features available in the EDMS.

FIND DOCUMENTS

- **Document Search:** Opens the main EDMS search screen.
- Public Records Req: Opens the online DEQ Public Records Request form allowing users to submit requests for paper or electronic copies of documents.

HELP

- About EDMS: Provides a brief description of the EDMS.
- Getting Started: Provides a checklist of required software and browser configurations necessary
 for optimal use. In addition, links are provided to free versions of software that may be required for
 certain functions of the EDMS.
- Guides & Manuals: Contains helpful user guides for the EDMS.
- Contact Us: E-mail comments or questions about the EDMS.

LOGON BOX

Indicates user's logon status. If the user is not logged on (anonymous/guest), *guest* or *Ideq-staff* will be displayed. If logged into the EDMS, user's username will appear in this box.

Not logged on:

- o **Logon:** Allows user to manually enter his or her username and password.
- Preferences: Allows user to customize some aspects of EDMS (page 7).

Logged on:

Logoff: log off from your EDMS account.

Note: When an LDEQ user logs off of an EDMS account, the following popup will appear to remind the user of the restrictions of a guest account:



o **Preferences:** Allows user to customize some aspects of EDMS (page 7).

Setting User Preferences

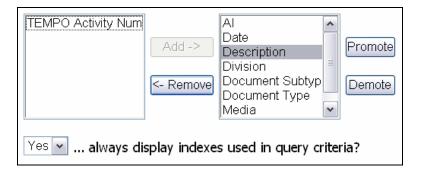
Some aspects of the EDMS can be customized to better suite your individual needs. To access the User Preferences screen, click the **preferences** link in the Logon Box. Settings can be changed for the following three features of EDMS. Please note that user preference settings require cookies to operate. Preferences can not be set if cookies are disabled, and they will have to be reset every time the cookie is deleted.

Al Query Preferences

• **Results Per Page:** the default number of results displayed simultaneously on the Agency Interest Search Results (page 39) screen. The settings range from 10 to 500 results.

Document Query Preferences

- **Results Per Page:** the default number of results displayed simultaneously on the Document Search Results (page 14) screen. The settings range from 10 to 500 results.
- **Result Columns:** sets the index fields that are displayed on the Document Search Results (page 14) screen. The first column displayed will always be Document ID (page 11). All other columns can be added, removed or reordered.



Items appearing in the left box will not be displayed, while items in the right box will be displayed on the results screen. To add a column to the display, highlight it in the left box and click the Add button. Similarly, a column may be removed from the display by highlighting it in the right box and clicking Remove.

Columns will appear on the Document Search Results (page 14) screen in the same order they appear in the right box (i.e. the topmost column will appear immediately to the right of the Document ID (page 11) column). To change the order of the columns, highlight the column that you would like to move. Clicking the Promote button will move the selected column higher in the list. Conversely, the Demote button will move the item lower.

The dropdown menu labeled ...always display indexes used in query criteria? controls the behavior of EDMS when a search is performed using an index that has not been selected for display. If Yes is selected, any column that is being searched will appear on the result screen, even if that column is

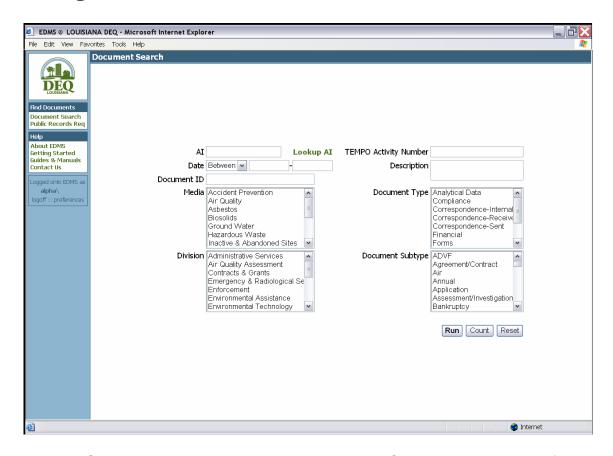
currently not selected for display. If No is selected, only the columns selected will be displayed, even if a deselected column has been used in the search.

For example, in the screenshot shown above, TEMPO Activity Number (Page 10) has been removed from the display. Since Yes is the currently selected option, the TEMPO Activity Number (Page 10) would appear on the result screen along with the other columns. If the setting was changed to No, TEMPO Activity Number (Page 10) would never appear on the result screen.

TEMPO-EDMS Link

- **Automatic Search:** By default, EDMS will take you directly to the Document Search Results (page 14) screen when a link between TEMPO and EDMS is being created (page 41). If you would like to review the query being made before going to the results screen, select No for this option.
- Inline Navigation: By default, EDMS runs in Inline Navigation mode when being accessed from TEMPO (page 41). While in Inline Navigation mode, the side bar of the EDMS window is not visible, and the document viewer opens in the main window rather than as a separate pop up. This feature is intended to streamline the process of creating a link between EDMS and TEMPO. However, if you would prefer EDMS to retain its normal functionality while creating links, you may select No for this option.

Searching for Documents



In the Document Search Form, select the criteria to search by. Click the Run button. Before running a search, use the Count button to see how many results will be returned. Doing so allows users to determine if they need to narrow or expand their search without having to take the time to load all of the results. Use the Reset button to clear all of the selections made or data entered in the search fields.

Use any of the following criteria to search for documents in the EDMS:

- Al: Enter one or more Agency Interest (Al) numbers. (page 10)
- **Lookup:** Opens a search form. Search for AI numbers by facility name, address, alternate name, alternate ID, or parish. If the AI is known, enter it in the field provided. (page 37)
- **Tempo Activity Number:** Also known as TEMPO Tracking Number, TEMPO Number, and Reference Number, this number links a specific set of documents together in TEMPO. (page 10)
- Date: Select the range of document creation dates to search from the drop-down menu. (page 10)
- **Description:** Enter a description. (page 10)
- Document ID: Enter one or more, separated by a semicolon (;). (page 11)
- Division: Search the division that is classified according to DEQ's current organization. If no selection, all divisions are returned. (page 11)
- **Document Type:** Select one or more that apply to the search. (page 12)
- Media: Term used to describe specific environments, such as air, water, etc., which are the subject
 of regulatory concern and activities. Choose one from the list. If no selection, all media are returned.
 (page 13)

Setting Search Criteria

To find the correct documents, use search criteria to limit the results that the EDMS returns. It should be noted that use of the Media, TEMPO Activity Number, and Description criteria involve full-text searches. As a result, queries that are based solely on these criteria will be relatively slow. To improve performance, pair them with other relevant criteria.

AGENCY INTEREST (AI) NUMBERS

All numbers are the unique identifiers given to each facility regulated by DEQ. If the All number is known, enter it into the All field. To enter multiple All numbers, separate them with a semicolon (;).

To find an unknown AI number for a facility, use the AI Lookup Tool (page 37).

TEMPO ACTIVITY NUMBER

TEMPO Activity Numbers are identifiers used to link specific documents in DEQ's central data management system. They are also known as a TEMPO Tracking Number, TEMPO Number, or Reference Number.

DATE

Date refers to the date under which a document was filed. The method used to determine this date can vary based on the type of document or the business practices of the DEQ organizational unit from which the document originated. For example, the date used for a permit or public notice document is the effective date of the document, while a discharge monitoring report will be indexed by the end of the monitoring period.

The EDMS allows four different methods for setting the date criteria. Select one of the following options from the drop down menu.

- 1. Between: Allows users to enter the beginning and ending of the range of dates to search. The EDMS returns all documents with dates that fall in the specified range. This is the default option.
- 2. After: Allows users to enter a single date. The EDMS returns all documents with dates equal or later than the specified date.
- 3. Before: Allows users to enter a single date. The EDMS returns all documents with dates equal or prior to the specified date.
- 4. Equals: Allows users to enter a single date. The EDMS returns all documents with the exact date specified.

DESCRIPTION

A document's description contains identifying information that will vary based on the document and subdocument types. The most recent format used for each type of document can be found in the Uniform Description List (UDL), which is located at http://recmgt/dts/ViewUDL.aspx. However, there will be some descriptions that vary from the format listed in the UDL. Also, some documents do not have descriptions.

All or part of a document's description can be entered into the **Description** field. Searches of the description field are not case sensitive. The wildcard operator * can be used to expand the scope of a search. A wildcard may be inserted into any part of the entry to represent omitted words or characters.

There is no need to include wildcard operators at the beginning or end of the search phrase; they will automatically be appended by the EDMS. However, wildcards can be useful when not searching for an exact phrase. Following are some examples of the use of wildcards:

- Finding two words that may have other intervening elements between them.
 - o Example: Locating documents with descriptions that concern wells in Plaguemine.
 - "plaquemine wells" returns no results
 - "plaguemine*wells" returns eleven results
- Truncating a word to find multiple words that share the same root.
 - Locating document concerning an investigation, which may have been described using any of the terms "investigation", "investigated", "investigative", and "investigatory"
 - "investigat*" would return document with description containing any of the above terms.

Note: Searches based on description are relatively slow (they may take up to two minutes). The search time will be improved greatly if other relevant criteria are used to limit the scope of the search.

DOCUMENT ID

A document ID is the unique identifier given to each document in the EDMS. To enter multiple document IDs, separate with semicolons (;).

DIVISION

A division is the DEQ organizational unit associated with a document. The classification used is based on DEQ's current organizational structure. The following divisions can be selected:

- Administrative Services
- Air Quality Assessment
- Contracts & Grants
- Emergency & Radiological Services
- Enforcement
- Environmental Assistance
- Environmental Technology
- Financial Services
- Human Resources
- Information Services
- Laboratory Services
- Legal
- OSEC
- Permits
- Remediation Services
- Surveillance
- Water Quality Assessment

If none of these options are selected, the EDMS will not limit the results based on division. To select an item, click on it. Multiple divisions can be selected or deselected by holding the **Ctrl** key and left clicking on the division.

NOTE: Divisions were not instituted at DEQ until 2001. To search for documents created prior to 2001, do not search by Division.

DOCMUNET TYPE AND SUBDOCUMENT TYPE

In order to improve the indexing of documents, all documents are classified on two hierarchical levels. The highest level is type, and all documents belong to one of these categories. Some types are further subdivided into subtypes, which identify documents more specifically. The classifications are as follows:

- Analytical Data
 - o Air
 - o Inorganic
 - o Metals
 - o Organic
 - Site Monitoring
 - Validation Packages
- Compliance
 - Noncompliance
 - o Notice
 - o Order
 - o Penalty
 - Warning Letters
- Correspondence-Internal
 - o Meeting
 - Note/Memo
- Correspondence-Received
 - o Green Cards
 - Returned Mail
- Correspondence-Sent
- Financial
 - Financial Assurance
 - o Invoice
 - State Revolving Fund
 - Trust Fund
 - Waste Tire
- Forms
 - o ADVF
 - o Manifest
- Legal
 - o Agreement/Contract
 - Bankruptcy
 - o Collection
 - o Confidentiality Request
 - o Declaratory Ruling
 - Hearing Request
 - Judgment/Decision/Order
 - Settlement
- Permits
 - Application
 - Certificate/License/Registration
 - o Draft Permit
 - o Final Permit

- Modifications
- Name/Owner Change
- Public Notice
- Variance/Exemptions
- Plans
 - Assessment/Investigation
 - Corrective Action
- Reports
 - o Annual
 - Assessment/Investigation
 - Corrective Action
 - o DMR
 - o Incident
 - Inspection
 - Monitoring
 - Quarterly
 - Reference Materials
 - Semi-Annual
 - o Testing

If none of these options are selected, the EDMS will not limit the results based on document or subdocument types. To select an item, click on it. Multiple items can be selected or deselected by holding the **Ctrl** key and left clicking on the items.

It is only possible to search for subdocument types that fall under the document types being searched.

MEDIA

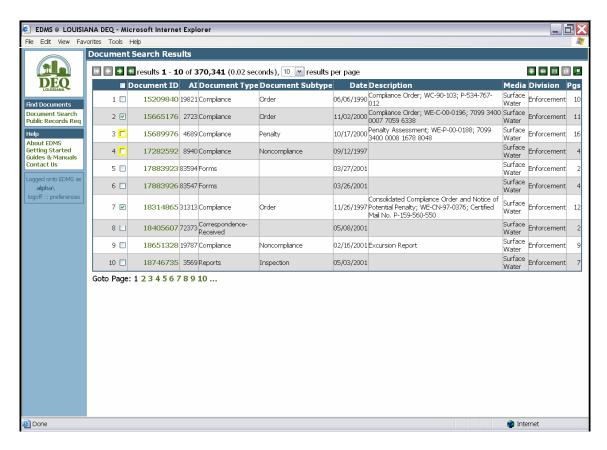
Media refer to the specific environments, which are the subject of regulatory concern and activities. The media are:

- Accident Prevention
- Air Quality
- Asbestos
- Ground Water
- Hazardous Waste
- Inactive & Abandoned Sites
- Lead
- Non-Applicable
- Radiation
- Solid Waste
- Surface Water
- Underground Storage Tanks

If none of these options are selected, the EDMS will not limit the results based on media. To select an item, click on it. Multiple items may be selected or deselected by holding the **Ctrl** key and left clicking on the items.

Note: Searches based on Description are relatively slow (they may take up to two minutes). The search time will be improved greatly if other relevant criteria are used to limit the scope of the search.

Search Results



After running a search, users will be redirected to the Document Search Results screen. This screen displays information about the documents retrieved, and allows users to select which document(s) to view.

By default, if a search returns less than 100,000 documents, the results will be sorted in reverse chronological order. Searches returning more than 100,000 documents will be arranged by document ID number (page 11). Document ID numbers are sequential, but reflect the order in which the documents were scanned into the system, not the date of the document. The oldest documents will not necessarily be in the beginning of the results.

To view a document, click on its Document ID number, which appears in green. The document will open in a new window. Once a document has been viewed, the checkbox preceding its Document ID number will be surrounded by a yellow border. This feature allows users to easily track which documents have been opened without interfering with the selection of documents for other features. For instructions on the tools available while viewing documents, please see the Viewing Documents section of this guide (page 18).

NAVIGATING THROUGH THE RESULTS

By default, the EDMS will display one hundred results per screen. Many searches will return more than one hundred results. EDMS offers several tools to help navigate through the search results.

If a search returns 100,000 documents or less, the results may be sorted by any criteria by clicking the header at the top of the column. Click the header once to sort the data in that field in ascending order. Click the header again to sort the data in descending order. Each additional click will alternate between ascending and descending. Results may only be sorted by one column at a time; clicking a different column header will cause the results to be sorted by that criteria.

There are several ways to page through the results. The four buttons in the top left hand corner allow users to move between pages of results.

First Page: Jumps to the first page of search results.

Previous Page: Goes back one page of search results.

Next Page: Goes forward one page of search results.

Last Page: Jumps to the last page of search results.

On the first or last page of results, the buttons allowing users to navigate backwards or forwards through the list will be grayed out.

To jump to a specific page number, click on the page number at the bottom of the screen. Only ten page numbers are displayed at a time, but users can navigate through the list of pages by clicking on the ellipses (...) at the beginning or end on the list of page numbers. The leading ellipses will load to the previous ten pages, while the trailing ellipses will load the next ten pages.

To change the number of results displayed on the page, select the desired number of pages from the drop down box near the top of the screen. Ten, twenty, fifty, one hundred, two hundred or five hundred results can be displayed. The larger the number of records per page, the longer a page will take to load.

If the desired documents are not contained in the initial results, or the result set is too large to locate the needed documents, alter the criteria used in the search. Clicking the Refine Query button will return to the Document Search screen. The search criteria previously selected will be maintained, and users may add to or modify the search criteria.

EXPORTING RESULTS

Exporting the results of a search allows users to save results for future reference or share them with others. The EDMS offers two main methods of exporting results: by e-mailing links to documents and exporting the results to a file.

E-MAILING LINKS

The EDMS allows users to e-mail a list of links to documents directly from inside the system. The recipient will be able to access the documents without having to perform a search. To e-mail links, click on the check boxes next to the desired documents, and then click on the **E-mail LINKS for Selected Documents** button (), located in the upper right hand corner of the screen.

The **E-mail Document Links** screen will open. For users with accounts, the **From** field will be automatically populated. If logged in as a guest, enter the user's e-mail address in the **From** field. Then, enter the e-mail address of the intended recipient in the **To** field. A message may be included in the **Comments** box. The recipient will receive an e-mail with the subject line "DEQ-EDMS Document Links". The body of the e-mail will contain anything entered in the **Comments** box followed by a list of links to the documents selected.

Note: This feature is not available to PRC users.

EXPORTING RESULTS TO FILE

The EDMS offers the ability to export the list of results as an Excel spreadsheet. There are two options for selecting which results to export:

Download All Results: Exports the result table as a CSU file (readable by MS Excel). This function is currently limited to 50,000 results. If more documents are present in the result set, this option will be disabled.

Download Page Results: Exports the current page of the result table as a CSU file (readable by MS Excel).

When either of these options is selected the following dialog box appears:



To view the spreadsheet without saving it, click the **Open** button. To save the spreadsheet, click the **Save** button. The default file name is **EDMS-document**- followed by the current date. The file name may be changed to be more meaningful, and will need to be changed to save more than one set of results in a single day.

Note: This feature is not available to PRC users.

DOWNLOADING DOCUMENTS

To download documents directly from the result screen without viewing them, click the checkbox next to each document to download. Then, click the **Download Selected Documents** button. The **Download Documents** screen will open, as shown below.

The documents you requested are now being retrieved and packaged in a ZIP file along with their properties. A hyperlink will be posted here when your documents are ready for pickup.

Document 2 of 3 13%

Overall Progress 37%

Cancel

The EDMS is creating a ZIP file containing the selected documents and an Excel spreadsheet that provides information on the selected document. The two progress bars denote how much of this process has been completed. The top bar represents the current document, and the bottom bar represents the entire process. To stop the process before it is complete, click on the **Cancel** button.

Once the ZIP file has been completed, the following screen will appear:



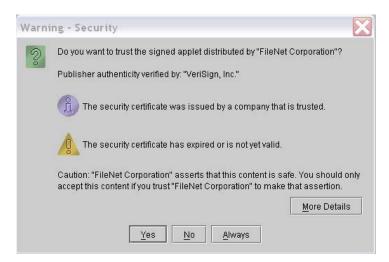
Click on the **pickup documents here** link to download the ZIP file. By default, EDMS generates a unique, random string to be used as the ZIP file name, so it will not be necessary to worry about duplicate file names. However, users may wish to give the file a name that is more meaningful themselves..

Note: This feature is not available to PRC users.

Viewing Documents

OPENING THE VIEWER

When opening a document, a message may appear asking if "...you want to trust the signed applet distributed by 'FileNet Corporation..." The appearance of the window may very slightly depending on the operating system and browser being used. The following example is from MS Windows XP using MS Internet Explorer 6:



Another example of the window is as follows:

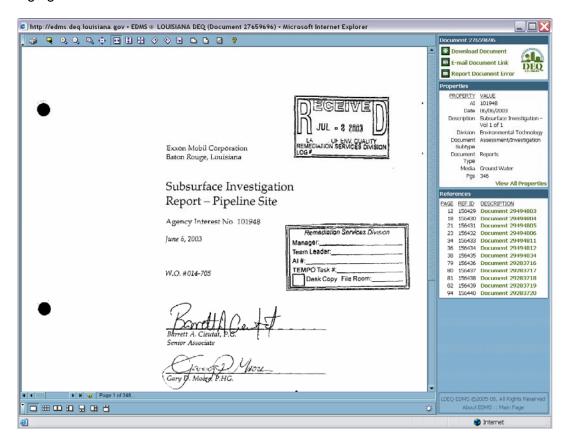


To continue to the document, choose either Yes or Always. Both options will allow the document to open, but each will affect future interaction with the Viewer in a different way. Selecting Yes will cause the same message to appear the next time a document is opened. Selecting Always will allow documents to open without asking permission again. With some operating systems, the Always option

will appear as a check box rather than a separate button. In this case, it would necessary to check the box, and then click the **Yes** button to avoid seeing this message again.

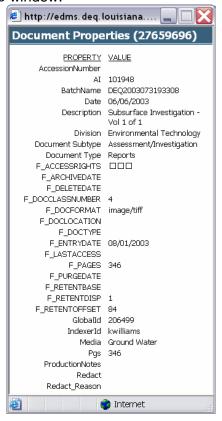
THE VIEWER WINDOW

The following figure shows the Viewer window.



- **Top tool bar:** Provides access to printing (page 29), zooming (page 24), and image manipulation (page 28).
- **Bottom tool bar:** Provides access to page navigation (page 24), Viewer mode (page 21), and display adjustment (page 29).
- Side bar:
 - Document Panel: Displays the document ID number. (page 11)
 - **Download Document:** Downloads and saves the document. (page 31)
- Email Document URL: Send an email containing a link to the document
- Report Document Error: Send an email to Document Corrections to report a problem with a document. (page 32)
 - o **Properties Panel:** Displays index information for the selected document.

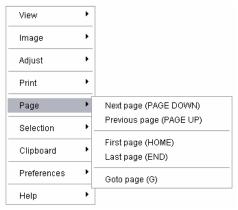
View All Properties: This link, located at the bottom of the Properties Panel, will open a popup window displaying all of the properties of a document. Shown below is an example of the Document Properties popup window.



 Reference Panel: if the selected document contains references to other documents in the EDMS, links to the referenced documents will appear in this window. Click the link to open the document.

VIEWER MENUS

To access the Viewers controls, right click inside the Viewer window (not in the toolbars). This will open a popup menu as shown below:



Viewer Menu

Below is a list of all the menus and their sub menus:

- View (page 21)
 - o View page
 - o View thumbnails
 - o View two pages
 - o View thumbnails: Left
 - View thumbnails: Bottom
 - o View thumbnails: Right
 - View thumbnails Top
- Image (page 24)
 - o Fit to window width
 - o Fit to window height
 - Fit to window
 - o **Zoom in**
 - o Zoom out
 - o **Zoom to 100%**
 - o Zoom area
 - o **Magnifier**
 - o Rotate clockwise
 - o Rotate counterclockwise
 - o Rotate 180°
 - o <u>Mirror</u>
 - o Flip
 - o Change enhance mode
 - o Invert
 - o Display as Grayscale
- Adjust (page 29)
 - o <u>Luminance +</u>
 - o <u>Luminance</u> –
 - Reset luminance
 - o Contrast +
 - o Contrast -
 - Reset contrast
 - Brightness +

- o Brightness -
- o Reset brightness
- Print (page 29)
 - o Print page
 - o Print page range
 - o Print selected pages
 - o Print document
 - o Print visible
 - Print Transformed
- Page (page 24)
 - o Next page
 - o Previous page
 - o First page
 - o Last page
 - Go to page
- Selection (page 21)
 - o Select page
 - o Clear selections
- Clipboard (page 30)
 - Copy page to clipboard
 - o Copy selected area to clipboard
 - Empty clipboard on close
- Preferences (page 30)
 - o Thumbnails larger
 - o Thumbnails smaller
 - o Thumbnails reset
 - Change background color
 - Change foreground color
 - o Print document without color
 - o Print document with color
 - Print original size

SELECTING PAGES

Some Viewer tools are only available after selecting pages in the document. To select the current page, press the **S** key on the keyboard or click **Select page** in the selection menu. A thumbnail can be selected in the same way by clicking on it first.

When a page is selected, its page number will appear in a small yellow box in the bottom right corner of the image and a check mark will appear next to **Select page** on the **Selection** menu. To deselect a document, press the **S** key again or click **Select page** a second time. All selections may be cleared by clicking **Clear selections** in the **Selection** menu or by pressing **Ctrl+S**.

VIEWER MODES

The Viewer has several different options for the presentation of documents.



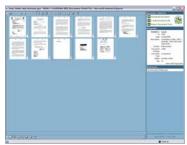
View Page: Displays one page of the image at a time. This mode offers the largest possible view of a document.



View Page



View Thumbnails: Displays all of the pages in a document. This mode can be particularly helpful when scanning a document to locate a specific page. Right-clicking on the icon will display only selected pages. (page21)



View thumbnails



View Two Pages: Displays two pages of the document simultaneously. Right-clicking on the icon will display only selected pages. (page 21)



View two pages



View Thumbnails: Left: Displays thumbnails of the document on the left. Divides the Viewer into two frames. One frame will display a single page from the document. The second frame, on the left side of the screen, will contain a column of thumbnails. The thumbnails can be used to navigate through the pages; clicking on a thumbnail will cause a larger image of that page to appear in the other frame. Right clicking on the icon will display only selected pages. (page 21)



View Thumbnails: Left



View Thumbnails: Bottom: Displays thumbnails of the document on the bottom. Same function as <u>View Thumbnails: Left</u>, except the thumbnails will appear in a row at the bottom of the screen.



View Thumbnails: Bottom



View Thumbnails: Right: Displays thumbnails of the document on the right. Same function as <u>View Thumbnails: Left</u>, except the thumbnails will appear in a column on the right side of the screen.



View Thumbnails: Right



View Thumbnails: Top: Displays thumbnails of the document on the top. Same function as <u>View Thumbnails: Left</u>, except the thumbnails will appear in a row on the top of the screen.



View Thumbnails: Top

NAVIGATING THROUGH A DOCMENT

It is not uncommon for a document to have several pages. As previously mentioned, it is possible to skip to a page by clicking on the thumbnail of that page. There are also several other options for navigating to a page.













First Page: Jumps to the first page of the document. (Keyboard shortcut: **Home**)

Previous Page: Goes back one page in the document. (Keyboard shortcut: **Page Up**)

Next Page: Goes forward one page in the document. (Keyboard shortcut: **Page Down**)

Last Page: Jumps to the last page of the document. (Keyboard shortcut: **End**)

Page Scrollbar: Drag the scroll bar to the left or right to move through the pages of the document. The current page number will be displayed in the status bar.

Go to page: Skip to a specified page in the document. Enter the page to view in the text box labeled **Please enter a page number** and click the **OK** button. (Keyboard shortcut: **G**)

MANIPULATING AN IMAGE

Images can be manipulated in the Viewer in a variety of ways. Use the settings in the Viewer to improve the quality and readability of an image.

ZOOM LEVEL

The tools described below can be used to resize the image for optimum viewing.



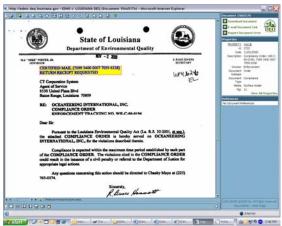
Zoom In: Magnifies the image by 25%. When in thumbnail view, the size of the thumbnails will increase. Right clicking this icon in one of the four thumbnail page views will increase the size of the thumbnails. When the Magnifier (page 25) is activated, the size of the magnifier window will increase. (Keyboard shortcut: +)

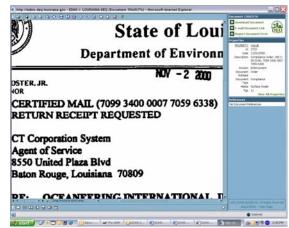


Zoom Out: Reduces the image by 25%. When in thumbnail view, the size of the thumbnails will decrease. Right clicking this button in one of the four thumbnail page views will decrease the size of the thumbnails. When the Magnifier (page 25) is activated, the size of the magnifier window will decrease. (Keyboard shortcut: -)



Zoom Area: Selects an area of the image to be magnified. With the **Zoom Area** tool selected, left click at one of the corners of the image to be enlarged and hold down the mouse button. Dragging the cursor while continuing to hold the left mouse button will create a yellow box on the image. Once this box encloses the entire area to enlarge, release the left mouse button. The image will be resized so that the selected area fills the entire view window. To turn this tool off, click its icon a second time. (Keyboard shortcut: A)



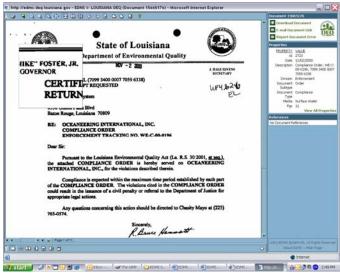


Selecting Zoom Area

Result of Zoom Area



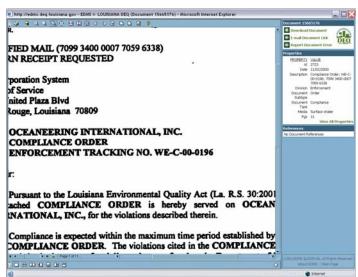
Show Magnifier: Magnifies an area within the image. The magnifier window can be resized using the Zoom In (page 24) and Zoom Out (page 25) features. To close the magnifier window, click the icon a second time. Right clicking this icon will cause the magnifier to open in a separate window. To zoom further in or out, simultaneously hold the Ctrl key down and turn the scroll wheel of the mouse. (Keyboard shortcut: M)



Magnifier



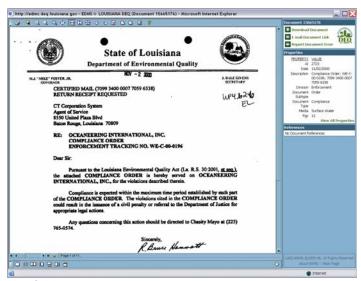
Zoom to 100%: Magnifies the image area to 100%. Vertical or horizontal scroll bars will appear if the height or width of the image extends beyond the edge of the screen. (Keyboard shortcut: **Z**)



Zoom 100%



Page Width: Scales the image to fit the width of the window. A vertical scroll bar will appear if the image height is greater than the height of the window. (Keyboard shortcut: F9)



Fit to width



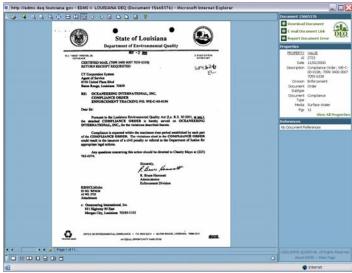
Page Height: Scales the image to fit the height of the window. A vertical scroll bar will appear if the image width is greater than the width of the window. (Keyboard shortcut: **F10**)



Fit to height



Fit to Window: Displays the entire image in the window. All document images will appear in this default mode. (Keyboard shortcut: **F11**)



Fit to window

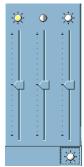
IMAGE ORIENTATION AND APPEAREANCE

- **Rotate Right:** Rotates the image 90° to the right (clockwise). Right clicking on this icon will apply the change to all pages in a document. (Keyboard shortcut: R)
- Rotate Left: Rotates the page and thumbnail image 90° to the left (counterclockwise). Right clicking on this icon will apply the change to all pages in a document. (Keyboard shortcut: L)
- Rotate 180°: Rotates the current page and thumbnail image 180°.
- Mirror: Flips the current page and thumbnail image backwards. Using this feature a second time will restore the image to its original state.
- Flip: Flips the image over. This is equivalent to simultaneously using the Mirror and Rotate 180° buttons. Using this feature a second time will restore the image to its original state.
- Invert On: Reverses the colors in an image. Using the feature a second time will restore the image to its original state. (Keyboard shortcut: I)
- **Change Enhance Mode:** Enhances the appearance of the document. (Keyboard shortcut: E) The modes below help improve the quality of document images.
 - + Automatic: Adaptive enhancement. This mode should select the best possible setting
 for each document. It is recommended that this setting is used unless the user is
 experiencing problems viewing a document.
 - 1 Weighted: Best for text
 - **2** Non-weighted: Best for diagrams
 - 3 Preserve Black: Best for fine lines
 - 0 Off: No enhancement

Display as Grayscale: Converts color images to grayscale. Using this feature a second time will restore the color in the image.

ADJUSTING THE DISPLAY

The display settings of the Viewer window may be adjusted by selecting the **Adjust** menu or by clicking the **Adjust** icon , which is located in the bottom right corner of the Viewer. A set of slider bars will then appear and can be used to make adjustments to the document image.



Adjust Slider Bars

The following settings can be changed:

Luminance

- To increase, select Luminance + from the menu or drag the Luminance slider bar up.
- To decrease, select Luminance from the menu or drag the Luminance slider bar down.
- To return to the default setting, select **Reset luminance** from the menu or click the **Luminance** icon at the top of the slider bar.

Contrast

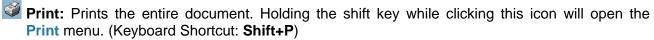
- To increase, select Contrast + from the menu or drag the Contrast slider bar up.
- To decrease, select Contrast from the menu of drag the Contrast slider bar down.
- To return to the default setting, select **Reset contrast** from the menu or click on the **Contrast** icon at the top of the slider bar.

Brightness

- To increase, select Brightness+ from the menu or drag the Brightness slider bar up.
- To decrease, select Brightness- from the menu or drag the Brightness slider bar down.
- To return to the default setting, select **Reset brightness** from the menu or click on the **Brightness** icon at the top of the slider bar.

Note: Some options may not be available for some types of documents.

PRINTING DOCUMENTS



- **Print Page:** Prints the current page. (Keyboard Shortcut: **P**)
- Print Page Range: Prints all pages within a specified range. (Keyboard Shortcut: Ctrl+P)
- Print Selected Pages: Prints only selected pages (page 21).
- **Print Visible:** Prints only part of the document that is currently displayed in the Viewer.
- **Print Transformed:** Prints the current page with any alterations (page 28) that have been made to the image. This option is only available if using Microsoft Windows.

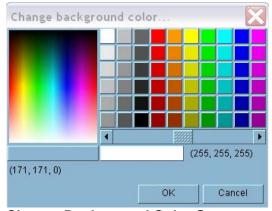
COPYING IMAGES TO THE CLIPBOARD

The options in the **Clipboard** menu allow users to copy images from the Viewer and paste them into other programs. To copy an entire page, select **Copy page to clipboard** or press **Ctrl+C**. If only interested in copying part of a page, select **Copy selected to clipboard**. Place the cursor at the corner of the area to copy, then left click and hold down the mouse button. Dragging the cursor will create a box. When the area to copy is inside the box, release the mouse button. The area selected will automatically be copied to the clipboard.

By default, the Viewer will empty the clipboard when it is closed. To turn off this feature so that items remain in the clipboard after the Viewer is closed, select **Empty clipboard on close**. There is no longer a check mark next to this item. Selecting **Empty clipboard on close** again will turn this feature back on.

VIEWER PREFERENCES

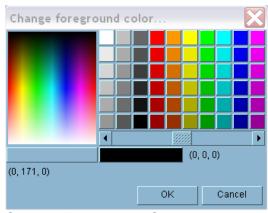
- Thumbnails Larger: Increases thumbnail size. This can also be done with the Zoom In (page24) feature.
- Thumbnails Smaller: Decreases thumbnail size. This can also be done with the Zoom Out (page 25) feature.
- Thumbnails Reset: Returns the thumbnails to their default size.
- Change Background Color: Allows users to change the Viewer's background color. The default color is white (225,225,225). Changes in this setting will not be apparent with color documents.



Change Background Color Screen

Select a color by clicking on the left palette or on one of the colored squares on the right. The small rectangular bar underneath the left palette displays the new color of the background, while the rectangular bar on the right displays the current background color. The numbers next to each bar are the RGB values for the selected color. Click the **OK** button to accept the changes or click **Cancel** to return to the Viewer. **Note:** Any changes made to the background color will be applied to all images being viewed.

• Change Foreground Color: Allows users to change the Viewer's foreground color (i.e. the color of the text and images on page). The default color is black (RBG value 0,0,0). Changes in this setting will not be apparent with color documents.



Change Foreground Color

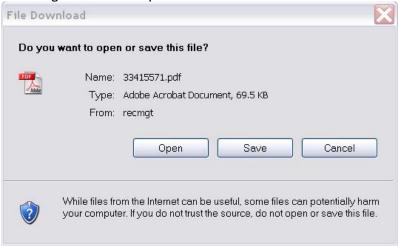
Select a color by clicking on the left palette or on one of the colored squares on the right. The small rectangular bar underneath the left palette displays the new color of the background, while the rectangular bar on the right displays the current background color. The numbers next to each bar are the RGB values for the selected color. Click the OK button to accept the changes or click Cancel to return to the Viewer. **Note:** Any changes made to the background color will be applied to all images being viewed.

The following three options are only available if using Microsoft Windows:

- **Print Document without Color:** Printouts are in grayscale, but this mode allows for faster printing.
- Print Document with Color: Printouts are in color, but this mode makes for slower printing.
- Print Original Size: Does not scale the document being printed to fit the page. If the document is
 too large for the printer, a warning message will be displayed.

DOWNLOADING DOCUMENTS

To download a document, click the **Download** button () in the **Document** panel, or click **Download This Document**. It may take a moment for the document to begin downloading. After initiating the download, do not click the **Download** button again. Use the stop or reset features on the browser. The following window will open:

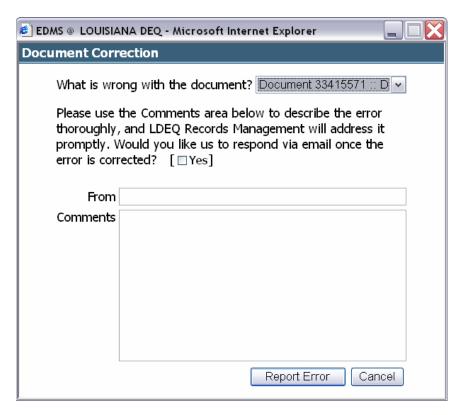


To view the document without saving it, click the **Open** button. To save the document, click **Save**, and the document will be saved in PDF format. The default name of the file will be the Document ID Number (page 11).

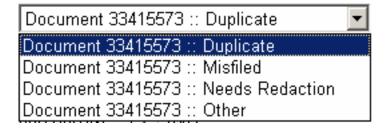
Note: This function is not available to PRC Users.

REPORTING DOCUMENT ERRORS

To report an error in a document (e.g., improperly indexed document or illegible document), send an email to Document Corrections at <u>documentcorrections@la.gov</u>. This can also be done by clicking the **Report Document Error** link or the report document error button (). The following window will open:



The Document ID number will automatically be inserted in the field provided. By clicking on the drop-down menu, the following options will appear:



Select the option that best describes the problem with the document. Below are descriptions of each option available.

- **Duplicate:** Multiple, identical copies of the document exist in the EDMS.
- Misfiled: Wrong information has been used to index the document.

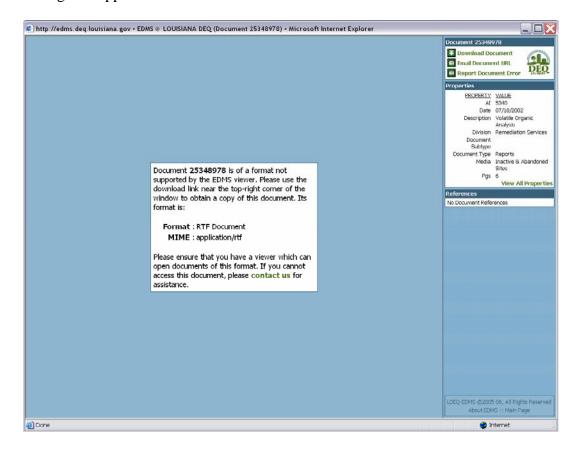
- Needs Redaction: Sensitive information that should not be visible to the general user population (e.g. Social Security Number) appears in a document that should not otherwise be confidential.
- Other: Any other problems not covered in the drop down menu.

If interested in being contacted when the error is resolved, click the checkbox labeled **Yes**. Please provide an e-mail address in the **From** box. Then, enter a thorough description of the error in the **Comments** box. Be sure to include all information that will be needed to correct the problem, such as the correct indexing information for misfiled documents or the other Document IDs (page 11) under which a document is duplicated. When complete, click the **Report Error** button to submit the e-mail to Document Corrections. Clicking the **Cancel** button will close the window without submitting an error report.

VIEWING NONSTANDARD DOCUMENTS

A small percentage of documents will not be accessible through normal means. These documents are either in a format not supported by the viewer, or they are confidential documents. If one of the documents is encountered, the following steps should be taken in order to view them:

• **Unsupported Format:** These documents are in a format not supported by the EDMS Viewer. If an attempt is made to load one of these documents in the viewer, a screen similar to the following will appear.

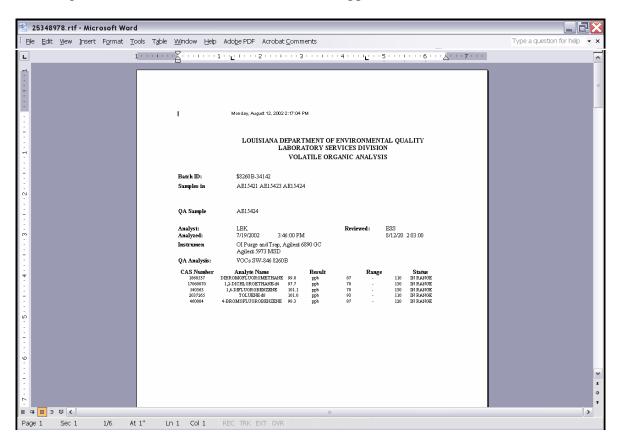


Note that the document number is provided, as well as the information regarding the format of the document. It will not be possible to view them inside the EDMS. However, these documents can still be viewed by acquiring a copy and using a viewer appropriate to that

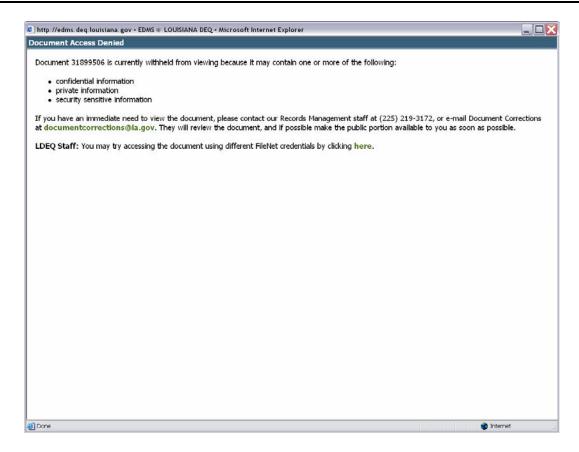
format (e.g. Adobe Reader for a PDF document). If the required viewer is not available on the system being userd, please see the **Getting Started** page (page 5) for links to free viewer applications. The method used to acquire a copy depends on the status of the user.

LDEQ Employees and Internet Users: Use the Download Document function (page 31).
 Use the appropriate viewer to open the document.

The example above shows the screen that would result if document 25348978, which is in RTF format, were loaded into the viewer. To view this document, click the **Download Document** button and follow the procedure for downloading a document (page 31). RTF documents can be opened by a variety of applications including MS Word and WordPad. The image below shows how the document would appear in MS Word 2003:

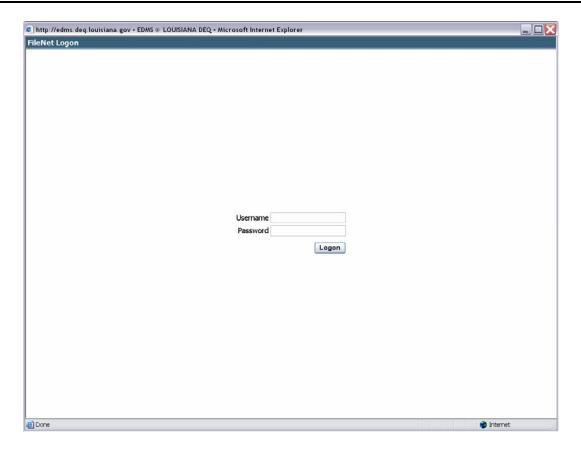


- o **PRC Users:** Ask a PRC Technician for assistance.
- Confidential Documents: These documents contain confidential, private, or sensitive security information. As such they are not freely available to either the public or the general population of LDEQ users. When a user attempts to load one of these documents in the viewer, a screen similar to the following will appear:



The method of accessing these documents depends on the user's status.

o **Authorized LDEQ Users:** Users authorized to view confidential documents can view them in EDMS. Click the link indicated for the purpose of entering FileNet credentials. The following screen will appear:



Enter the appropriate FileNet username and password and click the **Logon** button. If the credentials used have the appropriate access privileges the document will appear as normal. The FileNet credentials will remain active for the remainder of the session (i.e. until the application is closed). The next time the EDMS is activated, the credentials will have to be entered again.

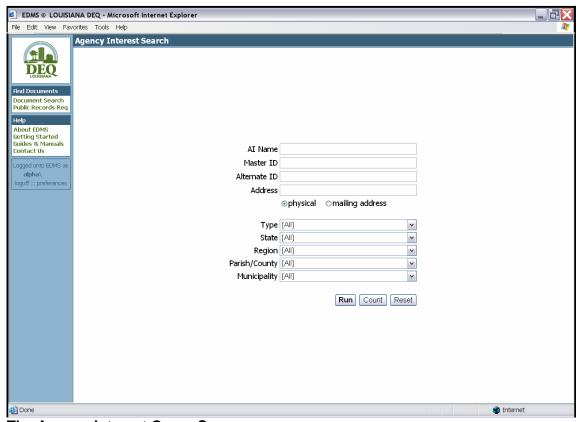
o **Other Users:** Contact Document Corrections by email at <u>documentcorrections@la.gov</u> or by phone at (225) 219-3172. The document will be reviewed, and, if possible, any portion of the document that can be released to the public will be provided.

Agency Interest Lookup Tool

The Agency Interest (AI) Lookup tool allows users to locate AI numbers or other details about a business or organizational entity. This feature is available from the main EDMS search screen. The AI number is the number assigned to a specific Agency Interest. AI numbers may also be found by searching TEMPO for the business' address.

AGENCY INTEREST QUERY SCREEN

The figure below shows the Agency Interest Query Screen.



The Agency Interest Query Screen

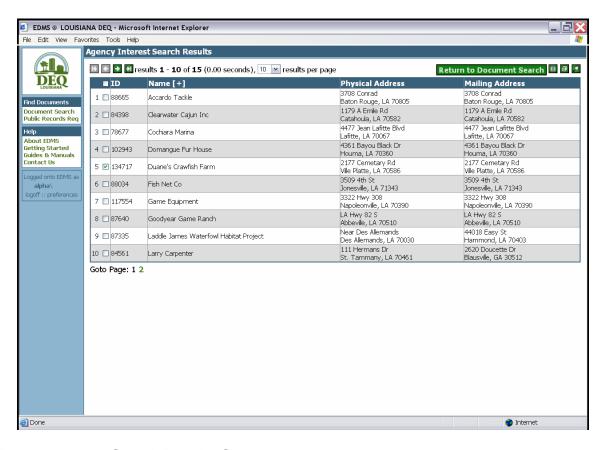
This allows the user to search for Als by the following criteria:

- Al Name: Case-insensitive search. Enter the part of or the entire name.
- Master ID: Al number.
- Alternate ID: Can be an alternative identification number.
- Address: Case-insensitive search. Can provide part of or the entire physical or mailing address.
- Type: Drop-down list of the type of Al.
- State: State in which the physical or mailing address is located.
- Region: DEQ designated geographical divisions of Louisiana.
 - Acadiana Region: includes Acadia, Evangeline, Iberia, Lafayette, St. Mary, St. Martin, St. Landry, and Vermillion Parishes

- Capitol Area Region: includes Ascension, Assumption, East Baton Rouge, East Feliciana, Iberville, Lafourche, Livingston, Pointe Coupee, St. Helena, St. James, Terrebonne, West Baton Rouge, and West Feliciana Parishes
- Northeast Region: includes Avoyelles, Caldwell, Catahoula, Concordia, East Carroll, Franklin, Grant, Jackson, LaSalle, Lincoln, Madison, Morehouse, Ouachita, Rapides, Richland, Tensas, Union, West Carroll, and Winn Parishes
- Northwest Region: includes Bienville, Bossier, Caddo, Claiborne, DeSoto, Natchitoches, Red River, Sabine, and Webster Parishes
- Southeast Region: includes Jefferson, Orleans, Plaquemines, St. Bernard, St. Charles,
 St. James, St. John the Baptist, St. Tammany, Tangipahoa, and Washington Parishes
- Southwest Region: includes Allen, Beauregard, Calcasieu, Cameron, Jefferson Davis, and Vernon Parishes
- Parish/County: Drop-down list of the parish or county in which the physical or mailing address is located.
- Municipality: Drop-down list of the city in which the physical or mailing address is located.

To perform a search, select the criteria to search by, then click on the **Run** button. Before running a search, use the **Count** button to see how many results will be returned. This allows users to determine whether to narrow or expand a search without having to take the time to load all of the results.

Agency Interest Search Result Screen



The Agency Interest Search Results Screen

The options available on the Agency Interest Result Screen are similar to those available on the Document Search Result Screen (page 14).

- Page Navigation buttons (page 15)
 - go to the first page of the results
 - go to the previous page of results
 - go to the next page of results
 - go to the last page of results
- Selecting the page to view (page 15)
- Selecting the number of pages displayed (page 15)
- Sorting by field (page 15)
 - Download all results (page 16)
 - Download page results (page 16)
 - Refine query (paste 15)

Please see the Document Search Result Screen (page 14) section for more information on these functions.

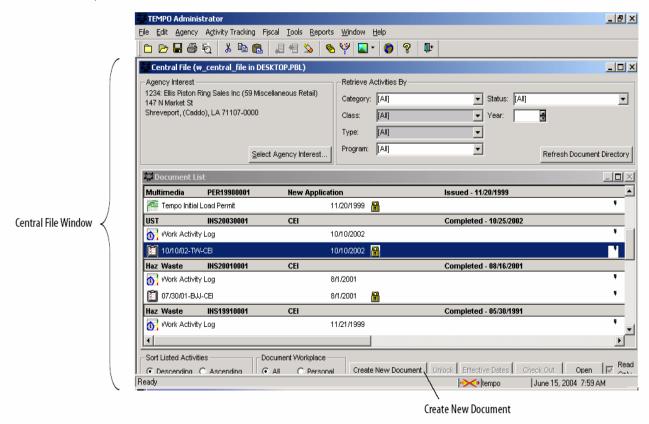
In addition, the Agency Interest Result Screen allows users to export AI numbers directly into a document search (page 9). To add AI numbers to a search, click the checkboxes next to the desired AI numbers, and then click the Return to Document Search button (Return to Document Search). The Document Search Screen will open with the selected AI numbers pre-filled in the AI field (page 9) and separated by semicolons (;).

Linking Between EDMS and TEMPO (LDEQ Only)

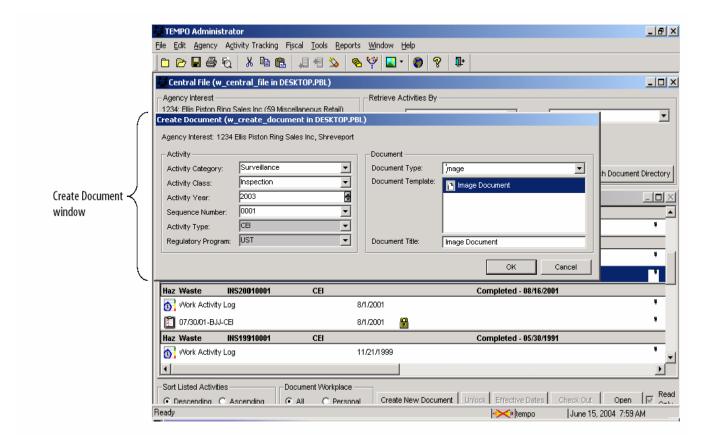
CREATING A LINK

Complete the following steps to create a link between EDMS and TEMPO:

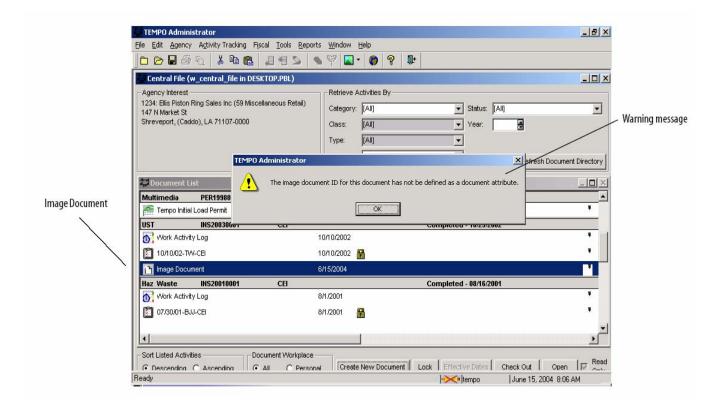
• In TEMPO, click the activity that the document link should be added to. Then click Create New Document, which is located at the bottom center of the Central File window.



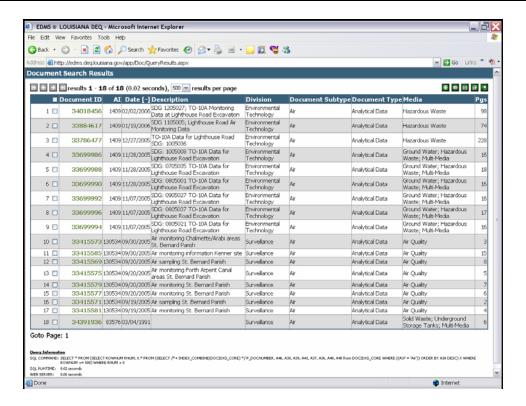
• The Create Document window will appear and pre-populate the Activity fields. Select Image from the Document Type list. Leave the existing name Image Document or modify the name as appropriate. Click OK to return to the Central File Window.



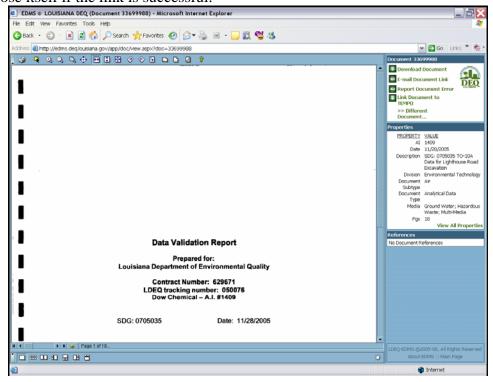
• Locate the new document under its new file name in the Central File Window and click on it. A warning message will then appear. Click OK to be directed to the EDMS Search screen.



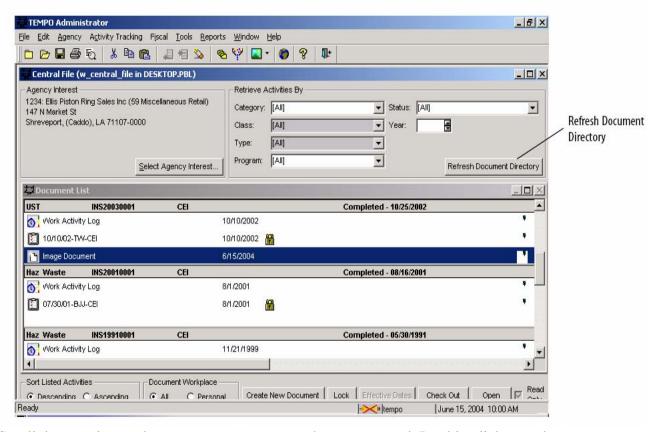
• TEMPO will generate the criteria for the query. Unless Automatic Search (page 8) has been disabled, the query will automatically be run and the Document Search Result screen (page 14) will appear. The side bar is not visible while in Inline Navigation mode, but all other functions of the results screen will operate normally. If the document to be linked is not part of the result set, use the Refine Query Icon to change the search criteria.



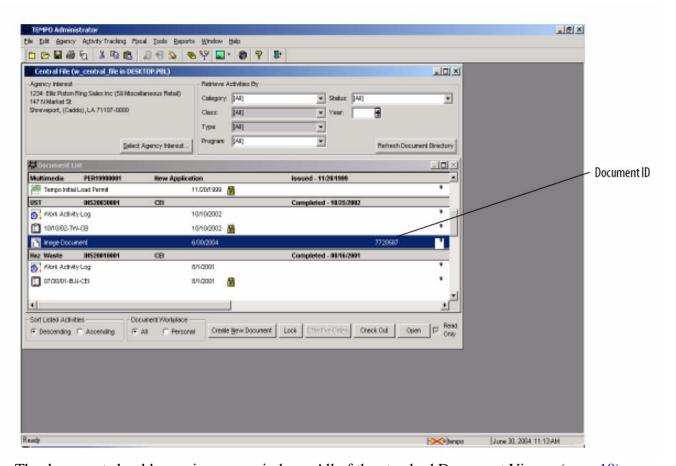
• View the document to be linked to TEMPO by clicking on its document ID. In Inline Navigation Mode, the viewer will open in the same window. To return to the search screen to choose another document, click the >>Different Document link. Once the proper document has been located click the Link Document to TEMPO icon to complete the link. The EDMS window will close itself if the link is successful.



• To verify that the link has been properly initiated return to the TEMPO screen. Click Refresh Document Directory.



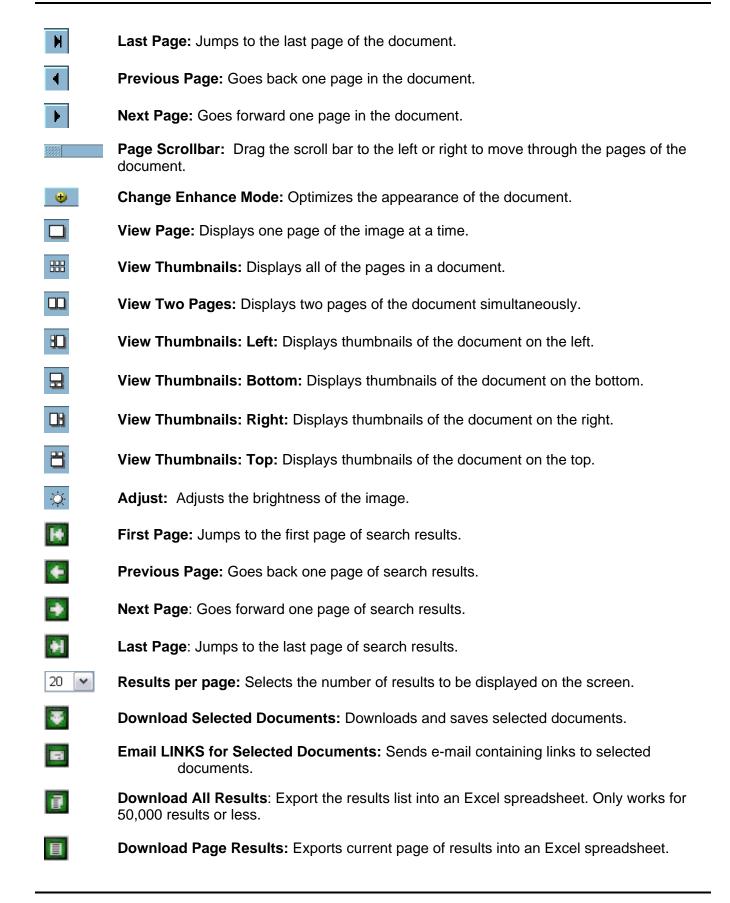
 Scroll down to locate the new Image Document that was created. Double-click near the Image Document to view the link.



• The document should open in a new window. All of the standard Document Viewer (page 18) functions will be available.

Appendix A: Keyboard Shortcuts and Icons

	Hide Toolbar: Removes top toolbar.
	Hide Toolbar: Removes bottom toolbar.
A	Show/Unhide Toolbar: Adds the bottom toolbar back to the screen.
	Show/Unhide Toolbar: Adds the top toolbar back to the screen.
©	Print: Prints the file or selected items. (Keyboard shortcut: Shift + P)
Q	Zoom Area: Selects an area of the image to be magnified. (Keyboard shortcut: A)
•	Zoom In: Magnifies the image by 10%. (Keyboard shortcut: +)
2	Zoom Out: Reduces the image by 10%. (Keyboard shortcut: -)
Q	Show Magnifier: Magnifies an area within the image. (Keyboard shortcut: M)
•	Zoom to 100%: Magnifies the image area to 100%.
↔	Page Width: Scales the image to fit the width of the window. (Keyboard shortcut: F9)
1	Page Height: Scales the image to fit the height of the window. (Keyboard shortcut: F10)
4	Fit to Window: Displays the entire image in the window. (Keyboard shortcut: F11)
②	Rotate Right: Rotates the image 90° to the right (clockwise). (Keyboard shortcut: R)
(Rotate Left: Rotates the image 90° to the left (counterclockwise). (Keyboard shortcut: L)
5	Rotate 180°: Rotates the image 180°.
	Mirror: Flips the image backwards.
	Flip: Flips the image over.
	Invert On: Reverses the colors in an image.
?	Help: Opens a viewer icon reference sheet. (Keyboard shortcut F1)
H	First Page: Jumps to the first page of the document.



P

Refine Search: Returns to the main search screen.

Select Pages Designate pages for use with other functions. (Keyboard shortcuts: S selects current page;

pressing S a second time will deselect a page. Ctrl+S clears all selections.)

Go to Page Keyboard shortcut: G opens dialog box allowing the user to skip to a specified page

number.

Printing Keyboard shortcuts: P prints current page. Ctrl+P prints pages in a specified range.

Shift+Ctrl+P prints selected documents. Popup Menu Options: Print→Print Visible prints the portion of the document visible on screen. Print→Print Transformed prints current

page with any image alterations.

Copying Keyboard shortcut: Ctrl+C copies current page to clipboard. Popup Menu Options:

Clipboard allows for the selection of an area of the screen to be copied.